Quotes from our David White & Associates team:

"If you have an offer from them, take it!"
~ Kirk Dobson

"Those that join us, stay with us. It's a family".
~ Chris White

"Once you get there, you will never want to leave". ~ Ivar Jones

"It is very rewarding to be involved in a career that provides true value to people".
~ Dave Lucas

Are you looking for a new career path?

David White & Associates can show you how to take it to the next level.

The DWA Team-2018

David White & Associates
dream, grow, protect, enjoy

3150 Crow Canyon Place, Suite 200
San Ramon, CA 94583
925-277-2600-Phone
925-277-2601-Fax
www.dwassociates.com

Together We Make a Difference

In an industry where we send 90% of our Advisors to Presidents Club.

Crystal Cup/Presidents Trophy
2011, 2012, 2013,
2014 & 2015, 2017
Ranked #1 Nationally out of 1,500 firms

David White & Associates

OVERVIEW

David White & Associates' comprehensive training and mentoring program helps our advisors develop the best lateral movement in the industry.

The ability to shift from topic to topic for an individual or business owner is critical to bringing the right solutions at the right time for our clients.

Founded in 1971, you will find that we are a different kind of firm in many ways, but what will be unique for you, is our independence, culture and the extensive financial planning expertise you will have at your fingertips.

TRAINING

How do we bring this to you and help launch your career?

- Monday Classes -Advanced
  - Business & Estate Planning Concepts
- Tuesday-Fundamental
  - Investment and insurance processes, practice management, business planning basics
- Sales Builder
  - Monthly think tank with other advisors, marketing, accountability
- FSEdNet
  - Online product, sales, process training
- Trustworthy Selling
  - 13 Week class to advance on emotional selling
- Women in Financial Services
  - Webinars, mentorship, leaders convention
- Ameritas New Advisor Training School
- Ameritas Advanced Markets

TRAINING CONTINUED

- Virtual Assistant
  - Personalized website, brochures, presentation pieces
- Weekly Management Meetings
  - Goal and case preparation review
- MDRT & Leaders Conferences
- Financial Planning Software
- CFP, ChFC, LUTCF Reimbursement Programs

MENTORING

"The world is full of educated derelicts."
– Calvin Coolidge

While our training system produces some of the most knowledgeable advisors, knowledge is not power. It's the application of this knowledge that is powerful. At David White & Associates, 70% of our business has 2 advisors working together. Whether you are new to the business and don't know what you don't know, or more experienced and know what you don't want to do, don't overlook the opportunity.

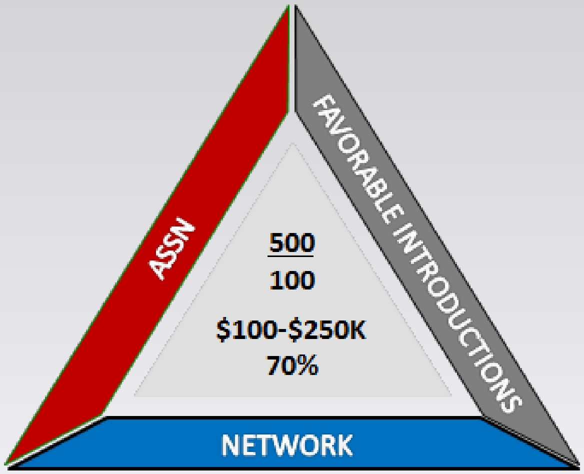
By learning in the field with experienced advisors, your practice grows much faster and you can trust that clients are getting the best advice while your education continues.

MARKETS

Association business will represent about 20-30% of your marketing plan. We add these markets to assist you in your efforts of building a successful practice. Studies show most financial professionals will earn the average of their client base. So it is critical to add afluent business owners to your book of business.

When ready, we help you by providing leads from our association mailing programs. This will, over time, become a key part of your goals.

MAGNIFICENT OBSESSION



10 Year Plan
500 Clients – 100 Bluechip
Residual Income from $100K to $250K
70% of Business is Clients Calling You